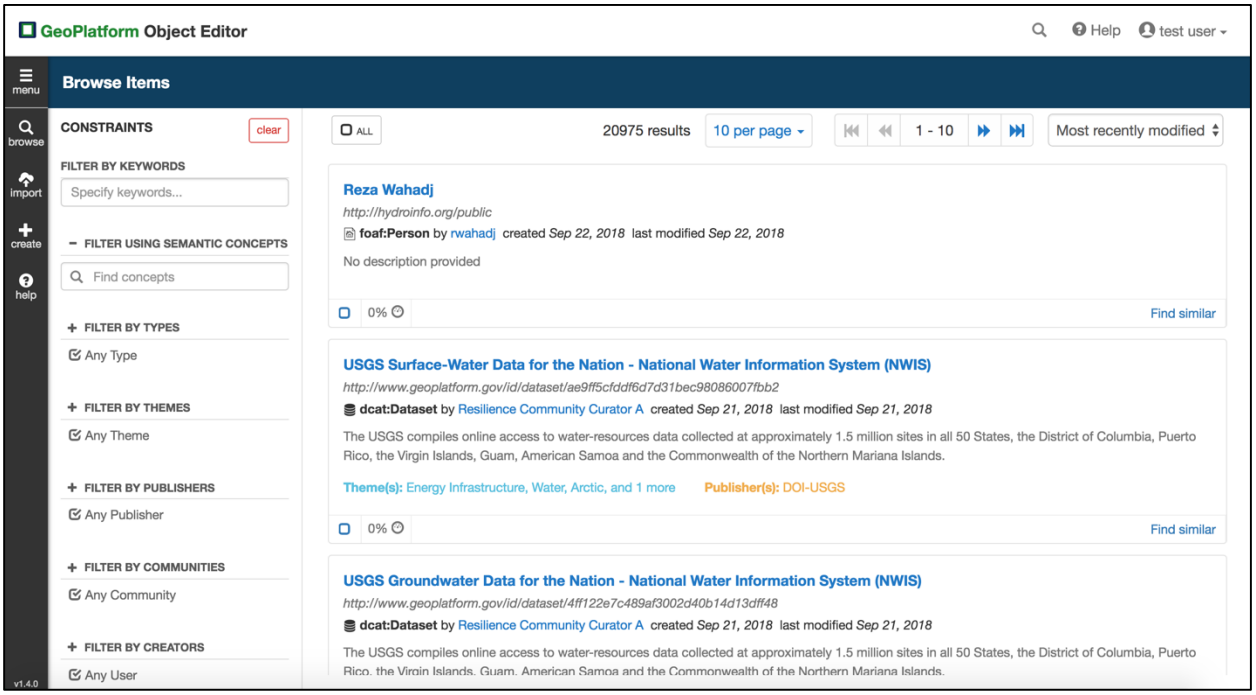
GeoPlatform.gov Beta Test Guide – Business Object Editor

Go here: https://stg-oe.geoplatform.gov/

Last Modified – 9/25/2018

What is it?

A tool for Portfolio Managers to create, update, view, link, and manage GeoPlatform objects including Datasets, Services, Open Layers, Organizations, Contacts, and other business objects used within the GeoPlatform.



Features include:

- Find GeoPlatform objects including: Datasets, Services, Open Layers, Organizations, Contacts, and Concepts
    - Sorting by name, type, or modified date.
    - Searching by keyword and filtering by, type, theme, agency, visibility, and location.
- Import ISO 19115 metadata to create new GeoPlatform objects
    - Create new Dataset, Service, Organization, and Contact resources from ISO-19139 XML metadata documents.
    - Built-in URIs used to uniquely and
- Automatically harvest online service resources to create Service and Open Layer objects within GeoPlatform
- Export GeoPlatform objects as ISO 19115 metadata for exchange with external systems
- Edit, correct, and augment GeoPlatform objects for improved informative value and search experience.
- Link objects with other GeoPlatform objects and with external resources to create a rich web of curated knowledge about all kinds of

persistently identify and link resources.

Geospatial resources.

- Import objects from ArcGIS.com

Instructions:

1. ***Find and try each of the above features.***
    a. ***Usable? If not, why not?***
    b. ***Intuitively obvious? If not, got a suggestion?***
    c. ***Feelings? (Like/Dislike/Meh)***
2. ***Spend quality time with it. Try the use-case scenario below then invent your own.***
3. ***Find a bug? Please send any bugs, questions, comments, or recommendations to Lara Duffy at larad@imagemattersllc.com***
    a. ***Include in subject line: "Object Editor Beta Test"***
    b. ***Don't hold back! Send us feedback as you go.***
    c. ***Let us know soonest if you need help or have questions.***
4. ***If you are having trouble logging in, you may be experiencing issues with Single Sign On (SSO) when switching between Beta and Production environments. Please clear your browser's cache and cookies, and then refresh the page (e.g <ctrl>-F5 and try again).***

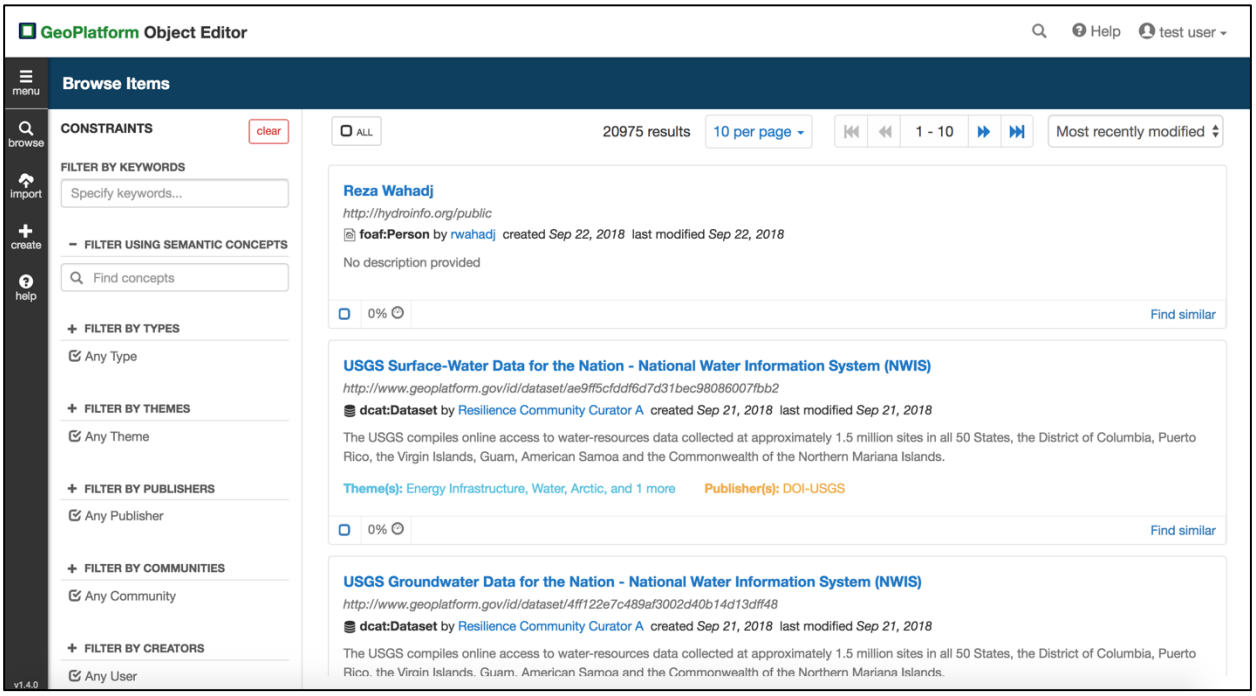
Typical Use-Case Scenarios

UC-1: Search Business Objects

Precondition: Metadata Registry is populated with one or more business objects (items and assets)

Steps:

1. Load Object Editor application.
2. If necessary, sign into your GeoPlatform account.
3. Navigate to the Browse page by clicking the magnifying glass glyph in the navigation menu on the left side of page.
4. Specify criteria to filter results:
    a. Keywords/ phrases
    b. Object types
    c. Themes
    d. Agencies/ Organizatons
    e. Creators (GeoPlatform user name)
    f. Visibility
    g. Location



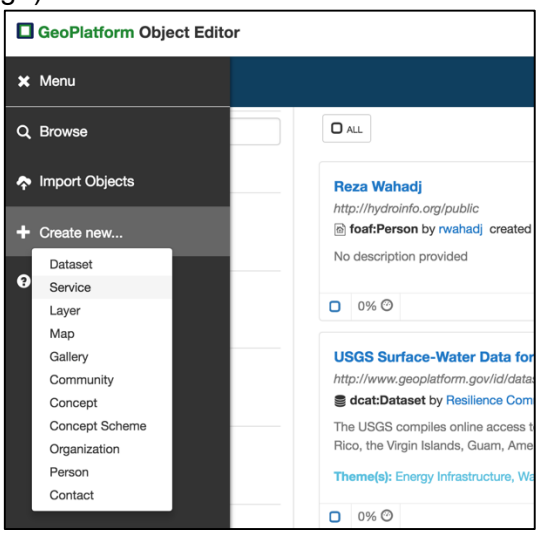
Postcondition: Search results are updated with business objects matching the criteria specified

UC-2: Create a new Service object.

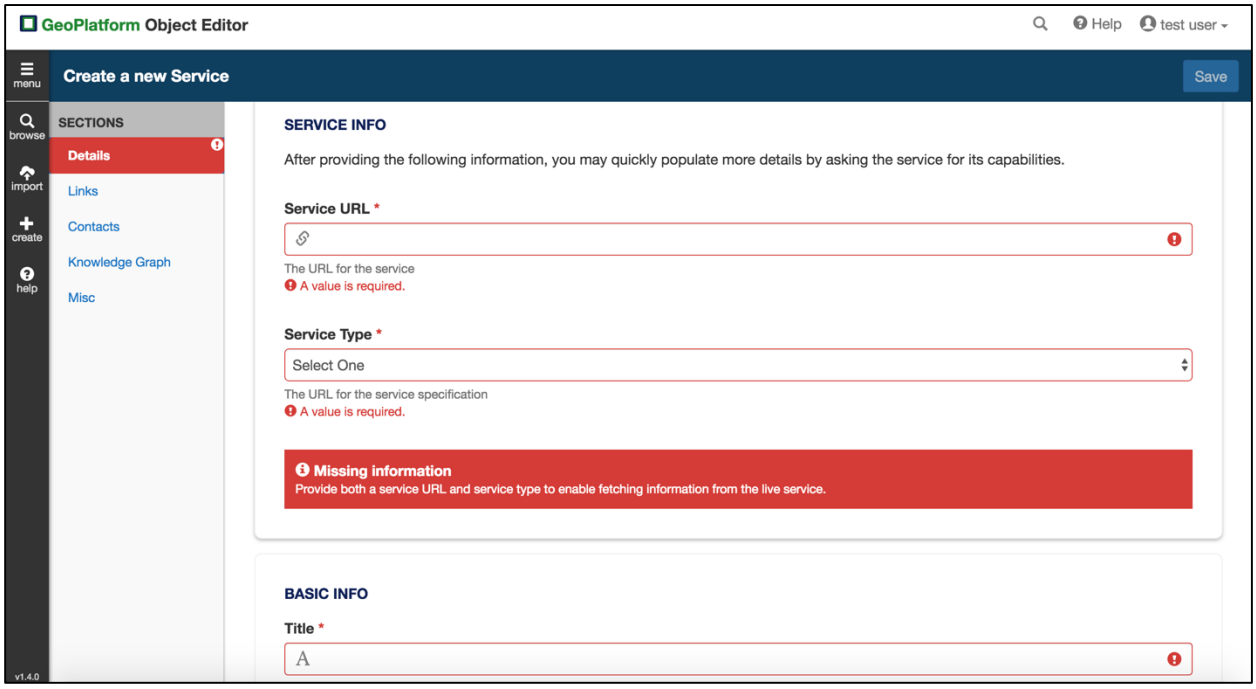
Precondition: User has accessed Object Editor,logged in and knows the URL of the service endpoint.

Steps:

1. Click on the "*Create new…*" (plus-sign glyph) in the *Navigation Menu* (left side of the page).

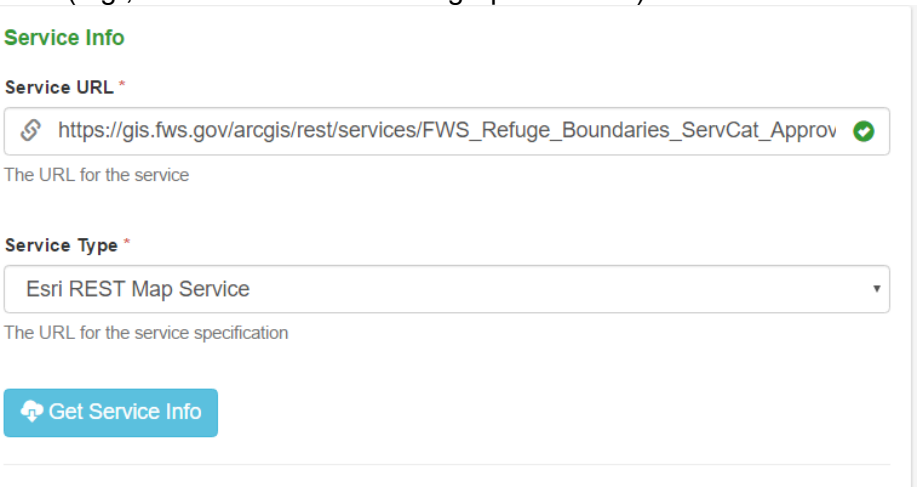


2. Select "*Service*" to open a new Service object. *Note: The Service Editor page appears with the editor navigation bar at top to guide users through each section (Details, Links, Contacts, and Miscellaneous) of mandatory and optional properties describing the resource.*

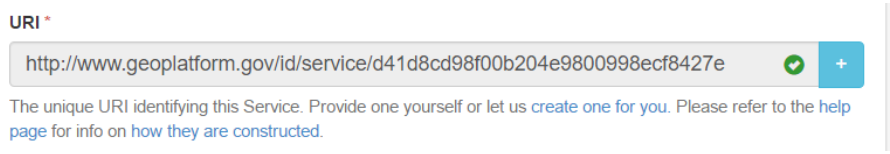


3. Add a Title (e.g., "*(your initials)* FWS Refuge Boundaries"). This property is mandatory.
   Note: for testing purposes, please prefix your initials to the Title so that you can be sure you are editing "your" service object and not conflicting with somebody else's.

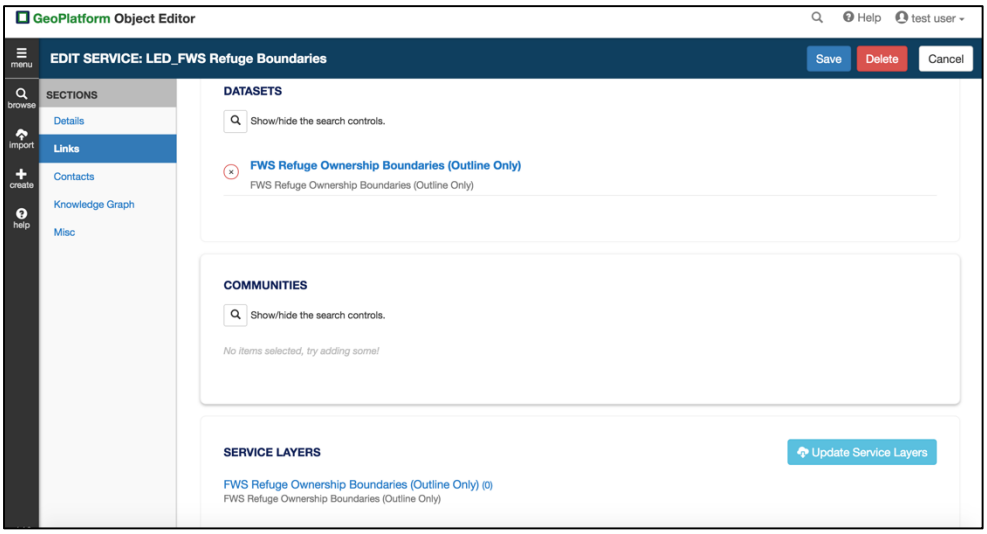
4. Add the URL for the service. (e.g., *https://gis.fws.gov/arcgis/rest/services/FWS_Refuge_Boundaries_ServCat_Approved/MapServer).* This property is mandatory.
5. Specify the Service Type (e.g., "*Esri REST Map Service*"). This property is mandatory.
6. Click the "*Get Service Info*" button to harvest additional metadata about the Service resource. Blank fields may be updated with information available at the service endpoint (e.g., coordinates for the Geographic Extent)



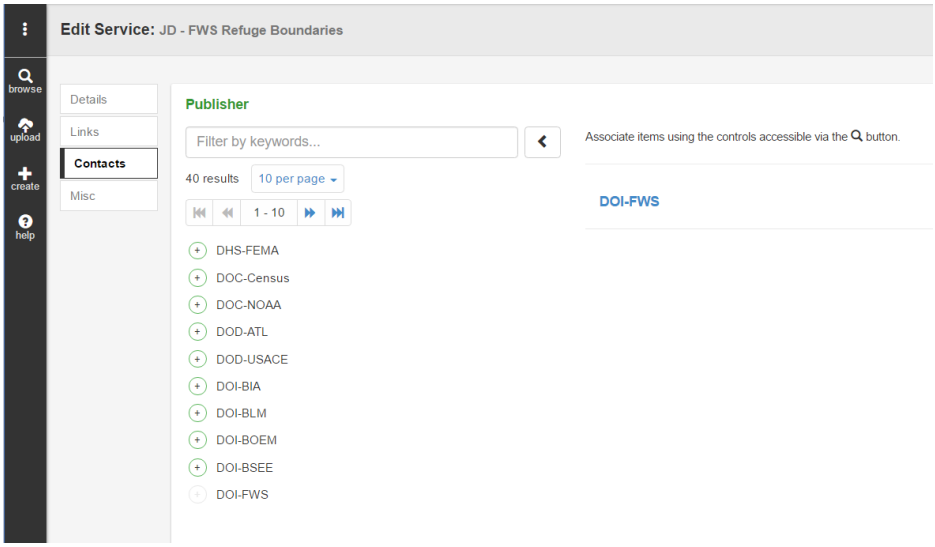
7. Specify the resource identifier (URI) for this Service. This property is mandatory and is used to uniquely identify the Service. The URI string should be defined according to standard production rules, usually specified and published by a naming authority (e.g., a standards organization or your agency). You can have the Object Editor automatically generate a unique and valid URI value by clicking the "create one for you" link.



8. Click Save button to create this Service object.
9. Navigate to the "Links" page for this Service and review contents. Click the "*Update Service Layers*" button to automatically harvest the Service's published layers to create Open Layer objects.



10. Navigate to the “Contacts” page for this service and review contents. Click the “magnifying glass” search widget to view a list of agencies to assign as “Publisher” of this Service. Select “DOI-FWS” as the publishing agency. *Note: many but not all Service resources provide publisher information in their metadata. When they do, this field will be automatically updated using the “Get Service Info” button (step 6 above) to harvest metadata about the Service.*



11. Add other information about the Service as you would like.
12. Click Save button.
13. Use the Browse tool to find the just-created Service.
14. Navigate to the GeoPlatform Performance Dashboard, Service Dashboard to find the Service object you just created and view the Service Details page.

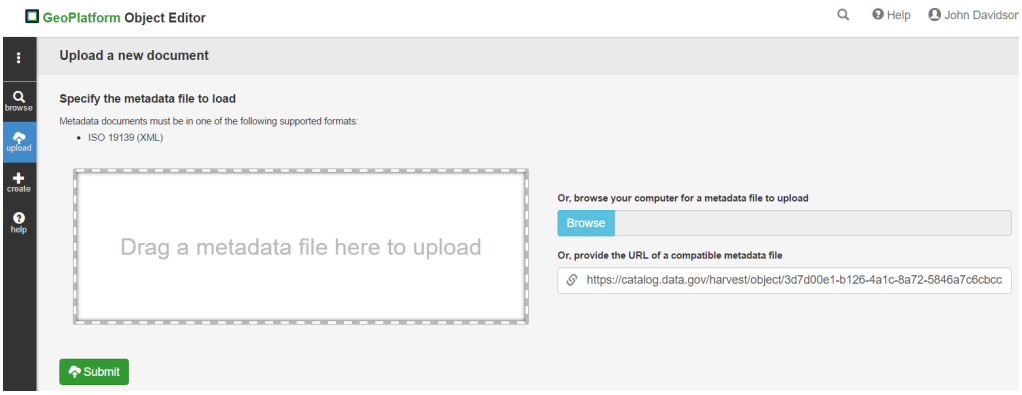
Postcondition: A new Service is created and can be found in the OE Browse tool, as well as on the Performance Dashboard. When you delete the newly created Service, it will not be found in either the Object Editor or the Performance Dashboard.

UC-3: Create a new Dataset object from an ISO metadata document.

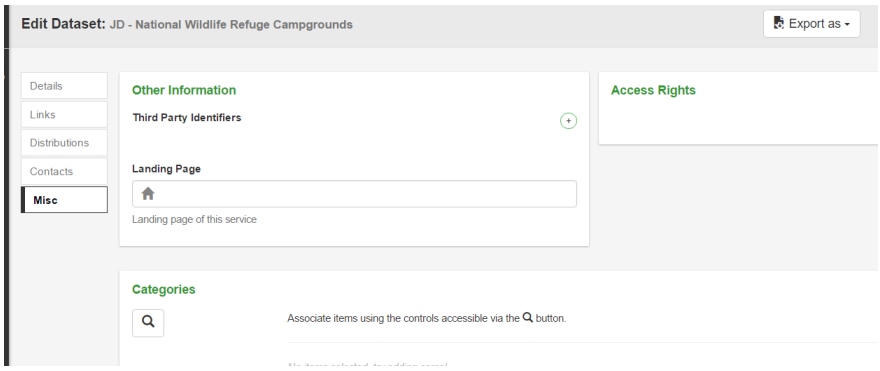
Precondition: User has accessed Object Editor and logged in.

Steps:

1. Click on the "*Upload Metadata*" button (Cloud/Upload glyph) in the *Navigation Menu* on left side of the page.
    a. As an example, use the following link to upload an ISO19139 metadata document for "Endangered Species Act" : https://catalog.data.gov/dataset/endangered-species-act35af1 (if not available at this link, see the dataset landing page and look for the metadata download here: https://catalog.data.gov/harvest/object/fed6bb22-ba3f-4f72-805f-0552b7928ceb)



2. Click Submit.
    a. *Note: You will be directed to a new Dataset Editor page where the metadata properties have been automatically extracted and mapped into Dataset object properties.*
    b. *Note: New Organization, Contact, and Concept (Keywords and Themes), and Service objects, as specified within the metadata document, may be automatically created during import.*
3. Review properties in the *Details*, *Links, Distributions, Contacts*, and *Misc* pages for this Dataset object.
4. Navigate to the "*Misc*" section of the Dataset object and in the "*Landing Page*" field, enter a URL to online content about this Dataset (e.g., https://catalog.data.gov/dataset/endangered-species-act35af1*)*



5. Browse and edit other fields of the Dataset object as you like.
6. When finished, click Save.

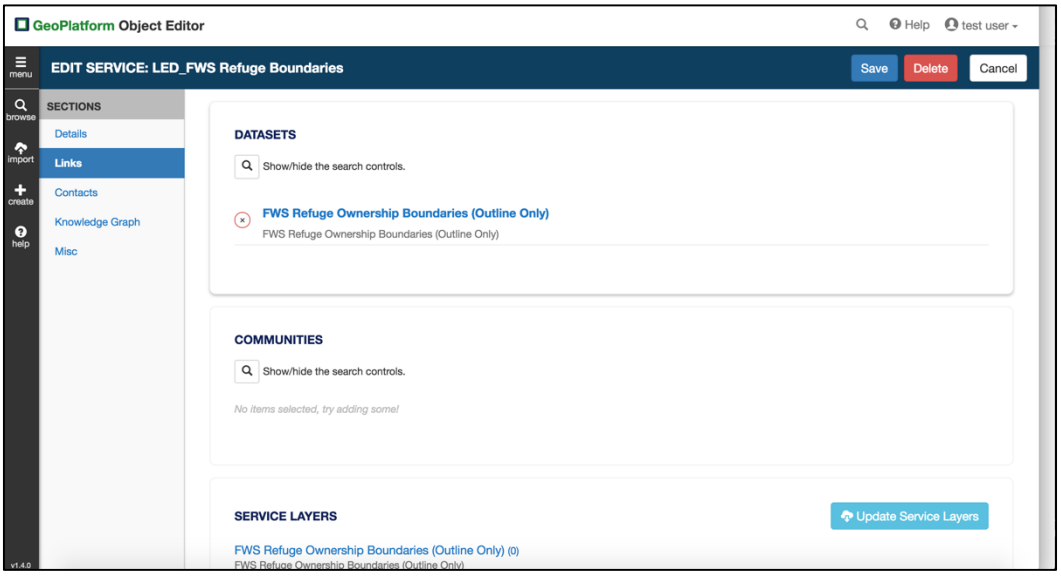
Post Condition: The Dataset has been created and can be found in the Object Editor Browse tool and elsewhere such as in the GeoPlatform Performance Dashboard.

UC-4: Link the Dataset to the Service.

Precondition: User has accessed and logged Object Editor and has created Service and Dataset objects as above.

Steps:

1. In the *OE Browser*, find the newly created Dataset from UC-3.
2. Click on the Dataset's edit button *("blue pencil" glyph*).
3. Navigate to the *Links* page
4. Expand the "*Services*" widget ("*magnifying glass" glyph)*
5. Using the Search bar, type in a phrase to find the Service you created earlier in UC-2. (e.g., using the example in UC-2, enter the phrase "FWS" or enter your initials)
6. Select the desired Service resource by clicking the green circle/plus sign.
    a. The Dataset is now linked to the selected Service
    b. *Note: Dataset objects can be linked to more than one Service object.*



7. Click "Save" in the top right of the editor page.

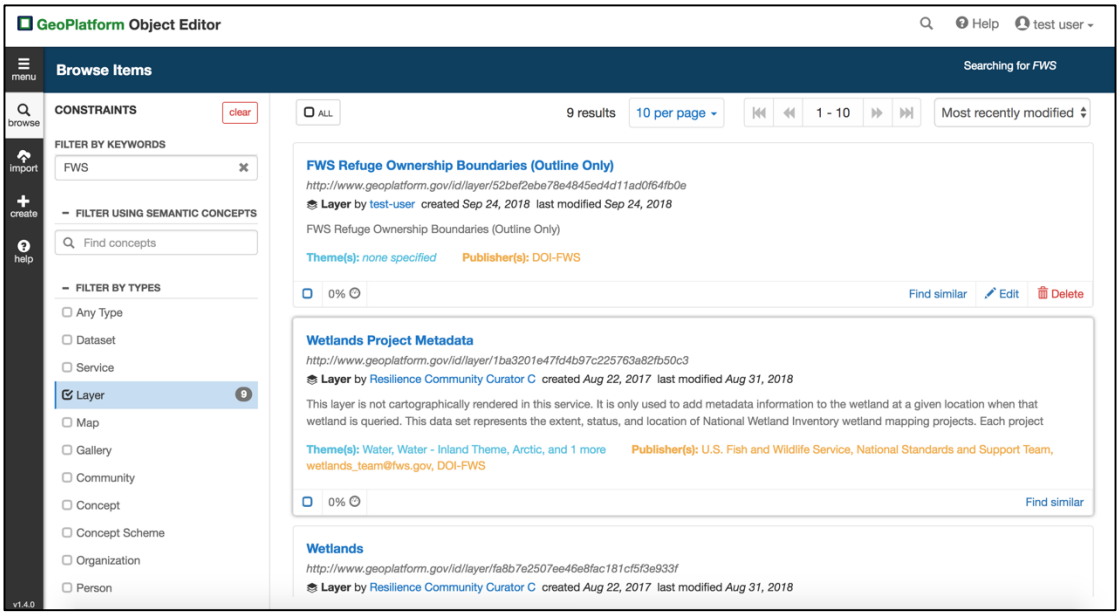
Postcondition: The Dataset is now linked to one or more Service objects and can be found and navigated in the Performance Dashboard's Service and Dataset Details pages.

UC-5: Link the Open Layer to the Dataset.

Precondition: User has access to the Object Editor and has created Service and Dataset objects as above.

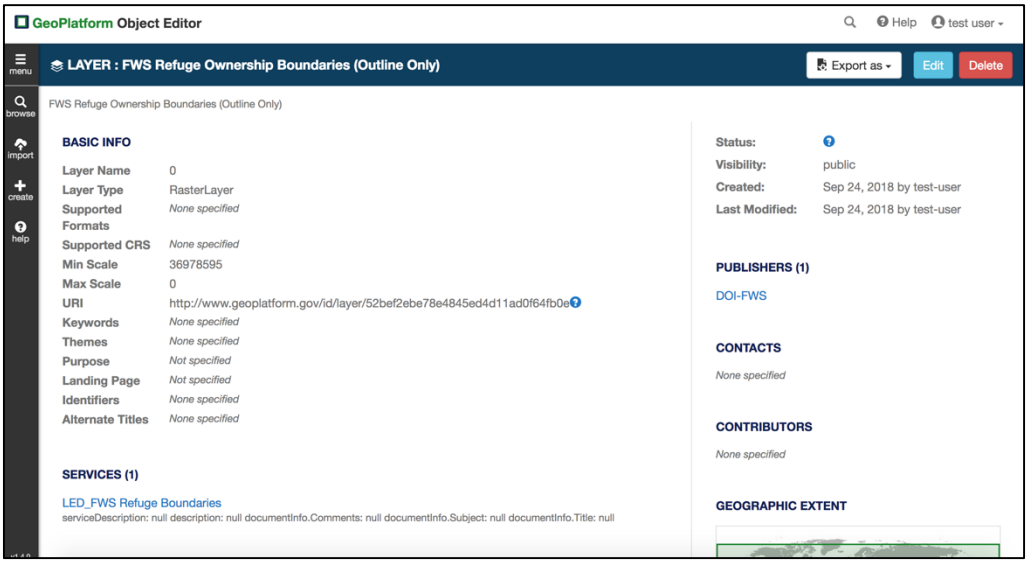
Steps:

1. In the *OE Browser*, find the newly created Layer from UC-2 (E.g., Search for “FWS” in the *Filter by Keywords* bar and use the *Filter by Type(s)* control to search for only “Layer” objects).

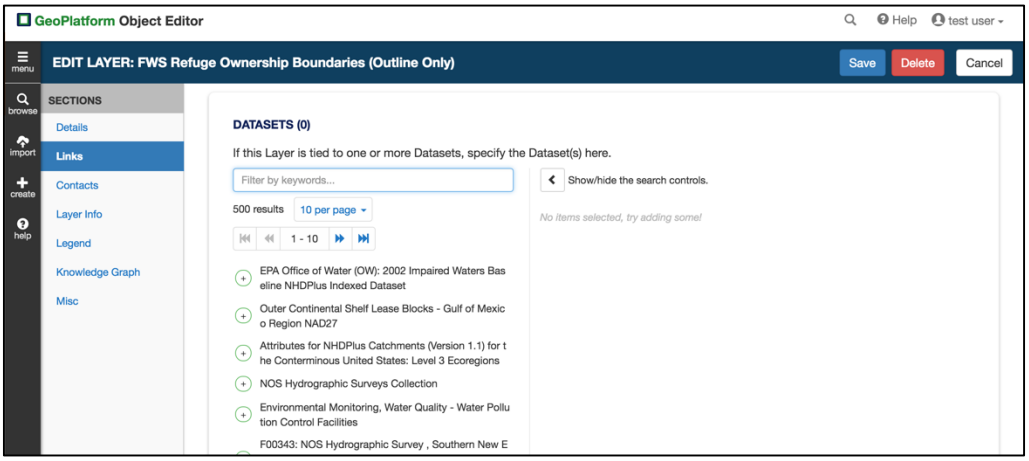


2. Click on the title of the selected Open Layer item to view information about it (e.g., the most recently modified item listed in the search results is likely the Open Layer object that was auto-harvested from steps performed in UC-2)
3. Review information presented about the Open Layer object to confirm this is a layer for the Service object created in UC-2.
    a. *Note: Links to its source Service objects are shown. This confirms the source for this Open Layer object is the Service object created in UC-2.*

4. Edit this Open Layer object (click on the Edit button in top right corner)
5. Review information about the Open Layer in the *Details*, *Links*, *Contacts*, *Legend*, and *Misc* pages.
6. Navigate to the *Links* page.



7. Scroll down the page and in the *Datasets* section, click on the “Search” widget (“*magnifying glass” glyph)*
8. Using the Search bar, type in a phrase to find the Service you created earlier in UC-3. (e.g., using the example in UC-3, enter the phrase “FWS” or enter your initials)
9. Select the desired Service resource by clicking the green circle/plus sign.



   a. The Layer is now linked to the selected Dataset
   b. *Note: Open Layer objects can be linked to more than one Dataset object.*)
10. Click “Save” in the top right of the editor page.

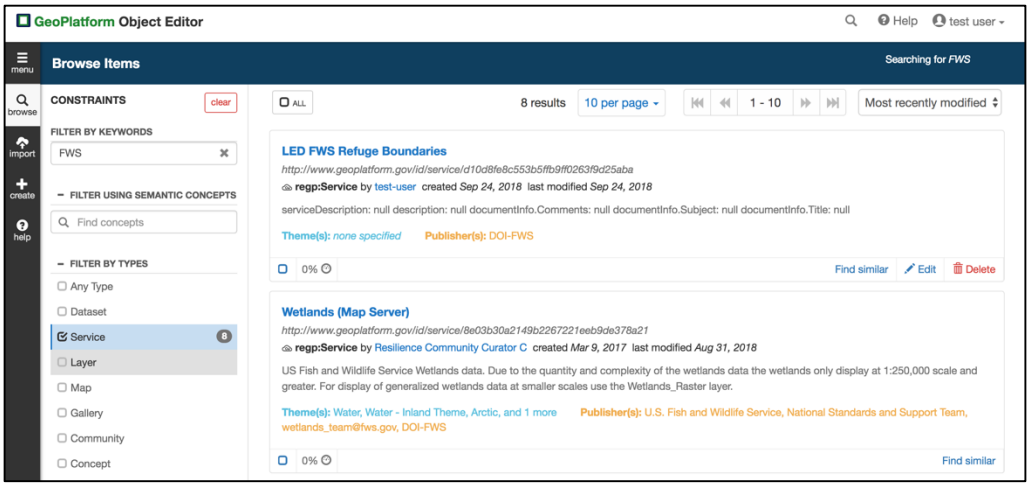
Postcondition: The Open Layer object is now linked to one or more Dataset objects.

UC-6: Export a Service object to an ISO metadata document.

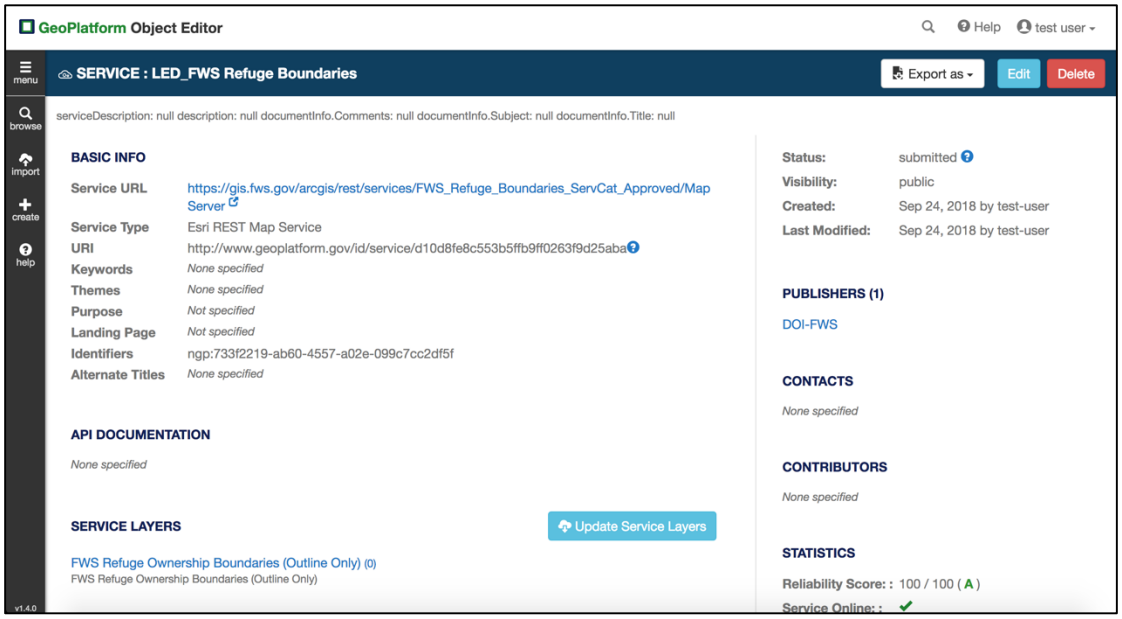
Precondition: User has access to the Object Editor and has finished UC-2.

Steps:

1. In the *OE Browser*, find the newly created Service from UC-2. (E.g., Search for "FWS" in the *Filter by Keywords* bar and use the *Filter by Type(s)* control to search for only "Service" objects).



2. Click on the title of the selected Service item to view information about it.



3. Click the "Export as" button to export ISO 19139-encoded metadata document.
4. Open the exported ISO metadata document in your favorite XML editor, load into your desktop GIS, or publish it to external catalog services.

Postcondition: Information about the selected object has been exported as an ISO 19115 metadata document for use in external systems.

UC-7: Delete Dataset and Service Object.

Precondition: User has access to the Object Editor and has finished UC-2.

Steps:

1. In the OE browser, find the newly created Service from UC-2.
2. Click on the *red trashcan* glyph to the right of the Service to delete it.
3. Click the green “Yes” to confirm you want to delete.

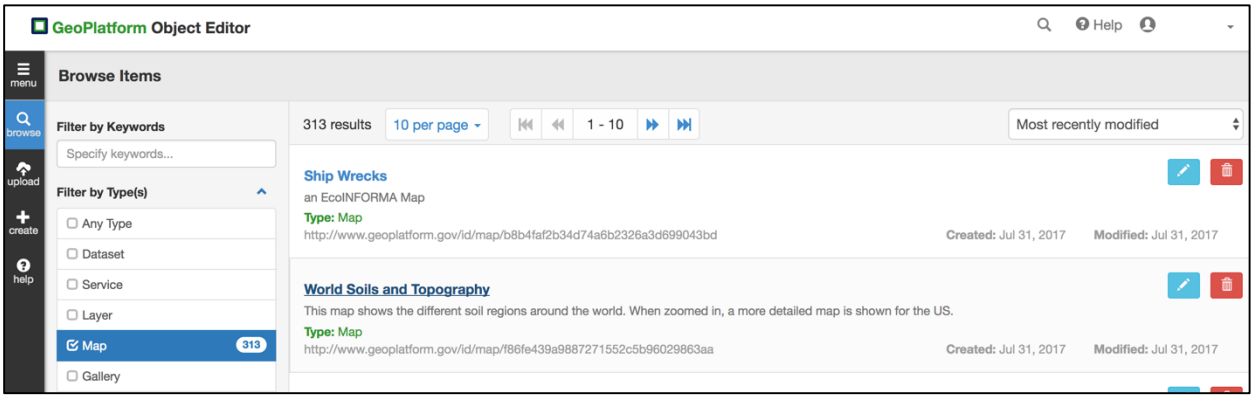
Postcondition: After deleting the Service created in UC-2 and Dataset created in UC-3, the objects cannot be accessed in either the Object Editor or the Performance Dashboard.

UC-8: Creating and Editing Map Objects.

Precondition: User has access to the Object Editor.

Steps:

1. Go to the GeoPlatform Map Viewer (https://stg-viewer.geoplatform.gov/).
2. Login
3. Using the “Find Layers to add to map” tool in the toolbar, find and “apply” layers to the map.
4. Go to the “My Map” tool to save your map.
    a. Fill out the name, description and keywords.
5. Click “save”.
    a. A green message should pop-up stating that your map has been saved.
6. Go to the GeoPlatform Object Editor (https://stg-oe.geoplatform.gov/).
7. Login (if you are not already).
8. Navigate to the “Browse” menu by clicking the magnifying glass.
9. In “Filter by Type”, select “Maps”
    a. You should see your map listed.



10. To edit your map’s information, click the blue pencil to the right of the maps title.

a. Here you can edit the details, Links, Contacts, Map Info, Annotations, legend, and miscallenious information.
b. The previously entered details should already be there.

11. When you are finished editing, click “save”.

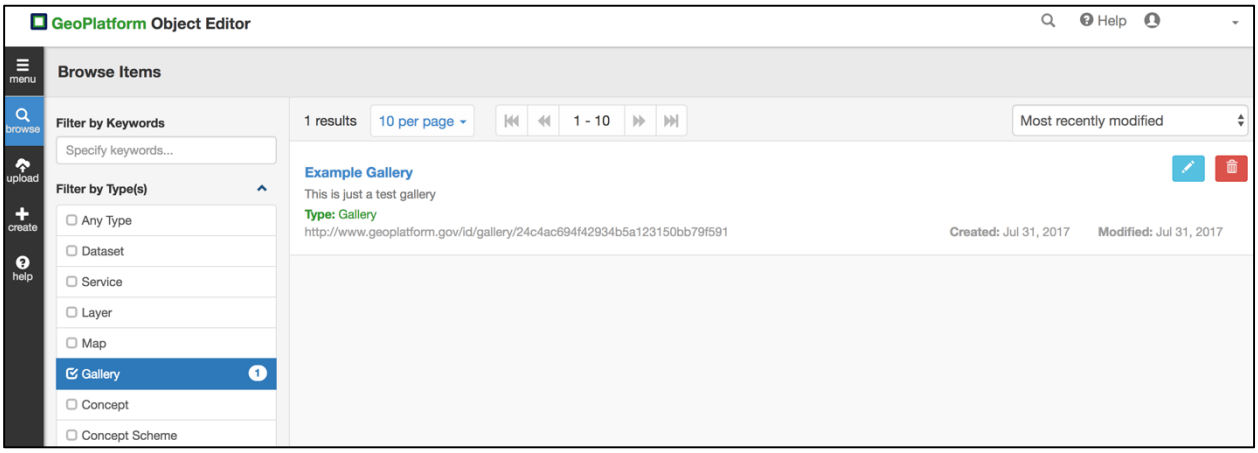
Postcondition: The newly created map is in the object editor and can be edited and saved.

UC-9: Creating and Editing Gallery Objects.

Precondition: User has access to the Object Editor and has finished UC-8.

Steps:

1. Go to the GeoPlatform Map Manager (https://stg-maps.geoplatform.gov).
2. If necessary, log into your GeoPlatform account.
3. Select several maps (include the map created in UC-8)
4. Click the blue “Add to Gallery” in the top right corner.
5. Create a new gallery
    a. Include the name, description, keywords, and themes.
6. Click “save”.
7. Go to Object Editor (https://stg-oe.geoplatform.gov/).
8. Login (if you are not already).
9. Navigate to the “Browse” menu by clicking the magnifying glass.
10. In the “Filter by Type” drop down menu, select “gallery”.
    a. You should see your newly created gallery.



11. Click the blue pencil to the right of the title to edit your gallery.
    a. The previously entered details should already be there.
12. Once you are finished editing, click save.

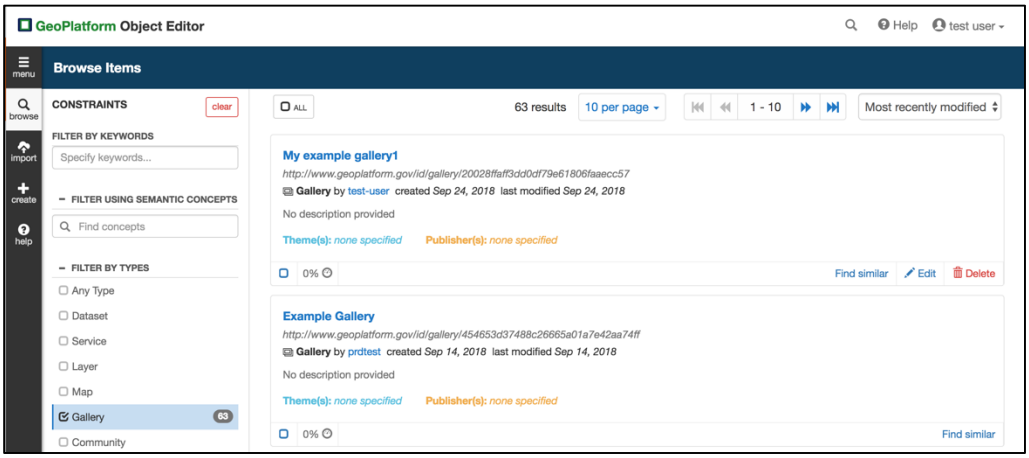
Post condition: The newly created gallery is in Object Editor and has been edited and saved.

UC-10: Deleting Maps and Galleries through the Object Editor.

Precondition: User has access to the Object Editor and has finished UC-8 and UC-9.

Steps:

1. Go to the Object Editor (https://stg-oe.geoplatform.gov).
2. If necessary, log into your GeoPlatform account.
3. Navigate to the “Browse” menu by clicking the magnifying glass.
4. In the “Filter by Type” drop down menu, select “Map”.
5. Find the map created in UC-8.
6. Click the red trashcan at the bottom right of the map object to delete the map
7. Click “Yes”.
8. In the “Filter by Type” drop down menu, select “Gallery”.
9. Find the gallery created in UC-9.
10. Click the red trashcan, to the right of the gallery’s title.



11. Click “Yes”.

Postcondition: The map from UC-8 and the gallery from UC-9 have both been deleted and can no longer be found in the Object Editor or Map Manger.

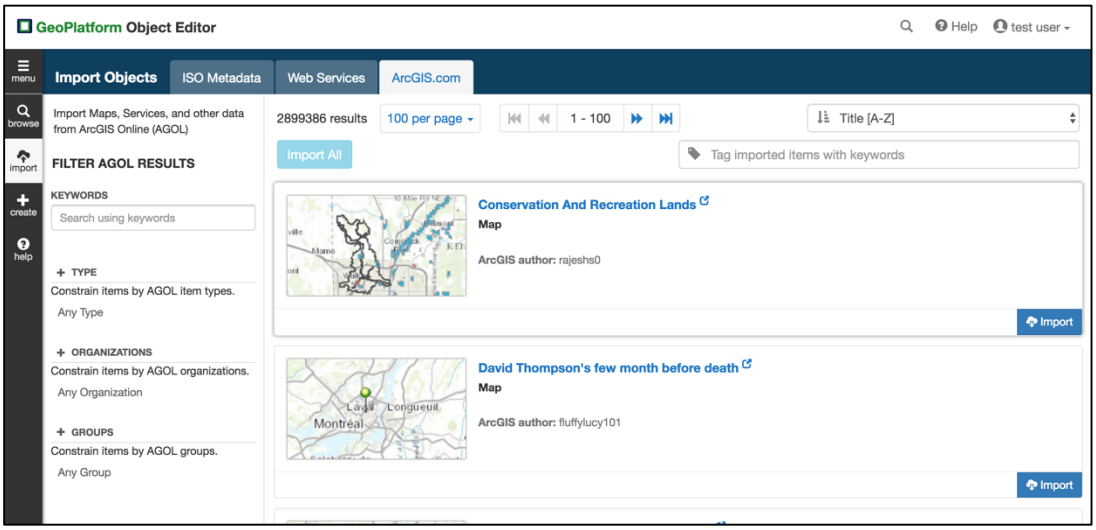
UC-11: Import objects from ArcGIS.com

Precondition: User has access to the Object Editor.

Steps:

1. Go to the Object Editor (https://stg-oe.geoplatform.gov).
2. If necessary, log into your GeoPlatform account.
3. Navigate to the import page.

4. Click on the ‘ArcGIS.com’ tab at the top.



5. Filter the results by using keywords, type, organizations, or groups.
6. Once you have found an object that you would like to import, select the blue ‘Import’ button on the right side of the object.
    a. If there is no blue import button, then the object has already been imported.
7. Go back to the ‘Browse’ page. The object that you just imported should be listed.

Post condition: The object imported from ArcGIS.com is listed in the Browse menu.